

WELCOME TO THE DIAZO TEAM

OUR DEDICATED ONBOARDING TEAM IS READY TO MAKE YOUR AND YOUR CLIENTS’ TRANSITION SEAMLESS

We are excited to have you join our team and look forward to growing our business together. Changing firms is always a challenge. With planning and experience, we are here to protect your business and clients with a well-orchestrated transition. We pledge to ensure you have the comprehensive resources necessary to make this process as smooth as possible. Behind the scenes, our 60-point Transition BlueprintSM helps us monitor every aspect of your business during your move – letting you focus on connecting with your clients.

Here is the timeline you can expect.

